

☞ **09hr\_SC-LEUA\_sb0390\_pt01**



Details:

(FORM UPDATED: 08/11/2010)

## **WISCONSIN STATE LEGISLATURE ... PUBLIC HEARING - COMMITTEE RECORDS**

### **2009-10**

(session year)

### **Senate**

(Assembly, Senate or Joint)

### **Committee on ... Labor, Elections, and Urban Affairs (SC-LEUA)**

### **COMMITTEE NOTICES ...**

- Committee Reports ... **CR**
- Executive Sessions ... **ES**
- Public Hearings ... **PH**

### **INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL**

- Appointments ... **Appt** (w/Record of Comm. Proceedings)
- Clearinghouse Rules ... **CRule** (w/Record of Comm. Proceedings)
- Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)
  - (**ab** = Assembly Bill)                      (**ar** = Assembly Resolution)                      (**ajr** = Assembly Joint Resolution)
  - (**sb** = Senate Bill)                              (**sr** = Senate Resolution)                              (**sjr** = Senate Joint Resolution)
- Miscellaneous ... **Misc**

## **Senate**

### **Record of Committee Proceedings**

#### **Committee on Labor, Elections and Urban Affairs**

##### **Senate Bill 390**

Relating to: deduction of voluntary payments from retirement annuities under the Wisconsin Retirement System.

By Senators Hansen, Coggs, Wirch, Kreitlow, Taylor, Lehman, Holperin, Miller, Erpenbach, Carpenter and Vinehout; cosponsored by Representatives Mason, Pocan, Berceau, Van Akkeren, Jorgensen, Shilling, Sinicki, Danou, Benedict, Hixson, Roys, A. Williams, Kessler, Colon, Hebl, Pope-Roberts, Zigmunt, Molepske Jr., Toles, Parisi and Soletski.

November 09, 2009 Referred to Committee on Labor, Elections and Urban Affairs.

March 3, 2010 **PUBLIC HEARING HELD**

Present: (5) Senators Coggs, Wirch, Lehman, A. Lasee and Grothman.

Absent: (0) None.

##### Appearances For

- Dave Hansen — Senator
- Jerry La Point — AFSCME Retirees
- Steve Regenstreif — AFSCME Retirees

##### Appearances Against

- Matt Stohr — Department of Employee Trust Funds
- Robert Schaefer — State Engineers Association

##### Appearances for Information Only

- None.

##### Registrations For

- Cory Mason — Representative
- Stephanie Bloomingdale — Wisconsin Federation of Nurses & Health Professionals
- Phil Neuenfeldt — Wisconsin State AFL-CIO
- Danny McGowan — Wisconsin Teamsters Joint Council 39
- Robert Kraig — Citizen Action of Wisconsin
- Bethany Ordaz — SEIU
- Tamara Grigsby — Representative
- Scott Spector — AFT Wisconsin
- Tom Speranza — Retired Firefighters

- Joe Strohl — Professional Firefighters of Wisconsin
- Kristen Dexter — Representative
- Susan McMurray — AFSCME
- Josh Dunbar — AFSCME
- Diane Schmahl — AFSCME
- Mary Goulding — AFSCME
- Linda Sines — AFSCME
- Shannon Jacobson — AFSCME
- Beth Lalor — AFSCME
- Paul Oosterhouse — AFSCME
- Harvey Austin — AFSCME
- Tom Corcoran — AFSCME
- Ralph Kracht — AFSCME
- Carol Zopan — AFSCME
- Kevin Jungwirth — AFSCME
- Tina Johnson — AFSCME
- Megan Quint — AFSCME
- Brian Henslin — AFSCME
- Patrick Wycoff — AFSCME
- Evelyn Meuret — AFSCME
- Cindy Schultz — AFSCME
- Dana Robinson — AFSCME
- Susan Rasch — AFSCME
- Karen Reiter — AFSCME
- Amanda Wisse — AFSCME
- Matt Davis — AFSCME
- Jane Holmes — AFSCME
- Karen Borst — AFSCME
- Danielle Hohner — AFSCME
- Kathy Wohler — AFSCME
- Deb Hiebing — AFSCME
- Robert McLinn — AFSCME
- Matthew Crossman — AFSCME
- Gary Herman — AFSCME
- Kally Rockow — AFSCME
- Thomas Manske — AFSCME
- Bonnie Manske — AFSCME
- Margaret Crossman — AFSCME
- Larry Brown — AFSCME
- Angie Hudson — AFSCME
- Jim Fabian — AFSCME
- Nancy Becker — AFSCME
- Manuel Cockroft — AFSCME
- Carol Kregs — AFSCME

- Korea Dalton — AFSCME
- Carol Wronski — AFSCME
- Larry Lautenschlager — AFSCME
- Steven Anderson — AFSCME
- Edward Bullock — AFSCME
- Leonard Taylor — AFSCME
- Wilma Crowder — AFSCME
- Elizabeth Boyd — AFSCME
- Andrea Brown — AFSCME
- Regina Hermon — AFSCME
- Ray Gray — AFSCME
- Joan Kaeding — AFSCME
- Kory Small — AFSCME
- Shawn Boston — AFSCME
- Robert Wise — AFSCME
- Cathy Myszkewicz — AFSCME
- Mary Jo Salas — AFSCME
- Paul Krien — AFSCME
- Marilyn Webb — AFSCME
- Clauda Weaver — AFSCME
- Kevin Manning — AFSCME
- Narazeah Cunningham — AFSCME
- Kathy Lill-Bonner — AFSCME
- Victoria Mayweather — AFSCME
- John Vena — AFSCME
- Kevin Schoofs — AFSCME
- Kurt Zunker — AFSCME
- Scott Sharp — AFSCME
- Rob Wayss — AFSCME
- Stephanie Findley — AFSCME
- Kimberly Harris — AFSCME
- John English — AFSCME
- Jack Bernfeld — AFSCME
- Jeffery Berger — AFSCME
- Zachary Wisniewski — AFSCME
- Rick Badger — AFSCME
- James Finnell — AFSCME
- Annie Wacker — AFSCME
- John Hackett — AFSCME
- Rita Phelan — AFSCME
- Pamela Meyer — AFSCME
- Tamela Jorgensen — AFSCME
- Keri McCollum — AFSCME
- Dennis Ellingson — AFSCME

- Steve Coleman — AFSCME
- Bill Reedy — AFSCME
- Harold Matthews — AFSCME
- Brad Cords — AFSCME
- William Backes — AFSCME
- Steve Hesselberg — AFSCME
- Paul Gibson — AFSCME
- Mary Braunreiter — AFSCME
- Keith Jamieson — AFSCME
- Shannon Gerue — AFSCME
- Lorraine Hoeffel — AFSCME
- Joann Syker — AFSCME
- Matt MacKenzie — AFSCME
- Chuck Guinness — AFSCME
- Mark Kramer — AFSCME
- Debra Taylor — AFSCME
- Paul Spink — AFSCME
- Ronald Bum — AFSCME
- Jean Bord — AFSCME
- Eric Meagher — AFSCME
- Jessica Meagler — AFSCME
- Amos Mietz — AFSCME
- Janet Ramsey — AFSCME
- Bjorn Olson — AFSCME
- Gregory Hazen — AFSCME
- William Miller — AFSCME
- Robert Horlacher — AFSCME
- Lori Vissers — AFSCME
- Rachel Henderson — AFSCME
- Aaron Branch — AFSCME
- Anneliese Sheahan — AFSCME
- Dennis Martin — AFSCME
- Susan Olsen — AFSCME
- Judith Gatlin — AFSCME
- Linda Womack — AFSCME
- Neill Kiley — AFSCME
- Nancy Patin — AFSCME
- James Talkingston — AFSCME
- Fay Hanson — AFSCME
- Donnette Havey — AFSCME
- Amelie Zongo — AFSCME
- Donna DeFlonan — AFSCME
- Stephanie Geishurt — AFSCME
- Dave Geishert — AFSCME

- Sherina Tucker — AFSCME
- Kimberly Galston — AFSCME
- Cathy Horenberger — AFSCME
- Sheri Schwartz — AFSCME
- Michael Reckles — AFSCME
- Marty Strub — AFSCME
- Tom Bourque — AFSCME
- Maurice Pulley — AFSCME
- John Zielinski — AFSCME
- Randy Marlett — AFSCME
- John Gast — AFSCME
- Dan Sessions — AFSCME
- Steven Riley — AFSCME
- Katrenia Grabowski — AFSCME
- Matthew Grabowski — AFSCME
- Anne Habel — AFSCME
- Edward Sadlowski — AFSCME
- Dave Vanden Noven — AFSCME
- Leah Lipska — AFSCME
- Mickey Lipska — AFSCME
- Ruth Gundlach — AFSCME
- Keith Clampitt — AFSCME
- Daniel Dixon — AFSCME
- Mark Thomas — AFSCME
- Bernard Lisner — AFSCME
- Karen Rutta — AFSCME
- Reynalso Vega — AFSCME
- Jeff Johnson — AFSCME
- Bret Kohlhepp — AFSCME
- JoAnne Evica — AFSCME
- Gerry Zastrow — AFSCME
- Gerry Zastrow — AFSCME
- Don Stuttgen — AFSCME
- Sue Christopherson — AFSCME
- Linda Alexander — AFSCME
- Debra Foth — AFSCME
- Steve Lewis — AFSCME
- Joseph Blair — AFSCME
- Joe Kreuser — AFSCME
- Kenneth Hodel — AFSCME
- Steve Knudson — AFSCME
- Paul Marten — AFSCME
- Audrey Kreuser — AFSCME
- Scott Hurd — AFSCME

- Darcy Eckland — AFSCME
- Bill Brockmiller — AFSCME
- Ronald Keenan — AFSCME
- Fran Schmidt — AFSCME
- Dave Stark — AFSCME
- Allen Lueck — AFSCME
- Pam Stetzer — AFSCME
- Garry Rapala — AFSCME
- Ronnie Hart — AFSCME
- Gilbert Johnson — AFSCME
- Renita Hoover — AFSCME
- Gary Mercier — AFSCME
- Aaron Puckett — AFSCME
- Jerome Lovelace — AFSCME
- Calvin Lee — AFSCME
- Steve Short — AFSCME
- Theresa Hernandez — AFSCME
- Julie Krucas — AFSCME
- Carrie Grunewald — AFSCME
- Caryn Heneman — AFSCME
- Cora Bell — AFSCME
- Sharon Pankau — AFSCME
- Monica Boyce-Richards — AFSCME
- Bruce Pankau — AFSCME
- Michael Will — AFSCME
- Kenny Tilleman — AFSCME
- Tim Jochman — AFSCME
- James Marczewski — AFSCME
- James Fields — AFSCME
- Sue Blaustein — AFSCME
- Shawn Welch — AFSCME
- Kenneth Wischer — AFSCME
- Joanne Marczewski — AFSCME
- David Eisner — AFSCME
- Carol Beals — AFSCME
- Randy Letlebo — AFSCME
- Lori Kief — AFSCME
- Dick Loeper — AFSCME
- Ann McNeary — AFSCME
- Greg Gotzion — AFSCME
- Ann Capadong — AFSCME
- Darold Lowe — AFSCME
- Gretchen Lowe — AFSCME
- Martin Kehrein — AFSCME

- Deborah Sproule — AFSCME
- Donald Martiniak — AFSCME
- Kim Scott — AFSCME
- John Newton — AFSCME
- Randy Brink — AFSCME
- Eric Robson — AFSCME
- Barb Peters — AFSCME
- Terry Fritter — AFSCME
- Martha Rydlewicz — AFSCME
- Tad Powalisz — AFSCME
- Terry Mueller — AFSCME
- Daniel Panowitz — AFSCME
- Nick Sekula — AFSCME
- Mark Dudek — AFSCME
- Thomas Bilicki — AFSCME
- Cecilia Lewandowski — AFSCME
- Linda Greene — AFSCME
- Nada Thomas — AFSCME
- Ken Jaeger — AFSCME
- Roger Hansen — AFSCME
- Mark Pohl — AFSCME
- Bill Dallmon — AFSCME
- Tommy Jones — AFSCME
- Tom Borgvist — AFSCME
- Kay Rataczak — AFSCME
- Karla Holmes — AFSCME
- Sue Steiner — AFSCME
- Vickie Schmidt — AFSCME
- Robert Knudsen — AFSCME
- Bill Sitter — AFSCME
- Tom Thornton — AFSCME
- Paul Wasemiller — AFSCME
- Tim Lemon — AFSCME
- Christine Kistner — AFSCME
- Greg Elliott — AFSCME
- Diana Smith — AFSCME
- Ken Weaver — AFSCME
- Randall Fox — AFSCME
- Charles Bruders — AFSCME
- Susan Miller — AFSCME
- Michael Murphy — AFSCME
- Jim Garity — AFSCME
- Roger Mroczenski — AFSCME
- Julie Allen — AFSCME



- Judy Beyer — AFSCME
- Timothy Allen — AFSCME
- Margaret Zautke — AFSCME
- John Buszka — AFSCME
- Daniel Lade — AFSCME
- Dan Bonneau — AFSCME
- Patricia Rogers — AFSCME
- Beth Werve — AFSCME
- Richard Baehring — AFSCME
- Paul Wilant — AFSCME
- Jason Otto — AFSCME
- Brian Stafford — AFSCME
- Keith Perkins — AFSCME
- Michael Ritchie — AFSCME
- Heidi Peterson — AFSCME
- Patrick Doyle — AFSCME
- Laurie Burke — AFSCME
- Pam Beining — AFSCME
- Joel Humski — AFSCME
- William Vogels — AFSCME
- Mike Halverson — AFSCME
- Mark Wojtak — AFSCME
- Mark Montague — AFSCME
- Sara Stichert — AFSCME
- Jason Feuchst — AFSCME
- Jeff Nicola — AFSCME
- Maske Jacob — AFSCME
- Jeffrey Christenson — AFSCME
- Jason Wunderlich — AFSCME
- Eric Johnson — AFSCME

Registrations Against

- None.

Registrations for Information Only

- Jane Elmer — Wisconsin Retired Educators Association
- Annaliece Ryres — Wisconsin Retired Educators Association

March 10, 2010

**EXECUTIVE SESSION HELD**

Present: (5) Senators Coggs, Wirch, Lehman, A. Lasee and Grothman.

Absent: (0) None.

Moved by Senator Wirch, seconded by Senator Lehman that  
**Senate Substitute Amendment 1** be recommended for adoption.

Ayes: (5) Senators Coggs, Wirch, Lehman, A. Lasee  
and Grothman.

Noes: (0) None.

ADOPTION OF SENATE SUBSTITUTE AMENDMENT 1  
RECOMMENDED, Ayes 5, Noes 0

Moved by Senator Wirch, seconded by Senator Lehman that  
**Senate Bill 390** be recommended for passage as amended.

Ayes: (3) Senators Coggs, Wirch and Lehman.

Noes: (2) Senators A. Lasee and Grothman.

PASSAGE AS AMENDED RECOMMENDED, Ayes 3, Noes 2



---

Adam Plotkin  
Committee Clerk

**Senate**

**Record of Committee Proceedings**

**Committee on Labor, Elections and Urban Affairs**

Found in SB 300  
filer.

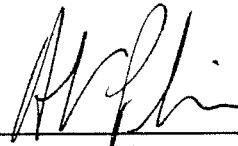
**Assembly Bill 916**

Relating to: deduction of voluntary payments from retirement annuities under the Wisconsin Retirement System.

By Representatives Mason, Pocan, Berceau, Van Akkeren, Jorgensen, Shilling, Sinicki, Danou, Benedict, Hixson, Roys, A. Williams, Kessler, Colon, Hebl, Pope-Roberts, Zigmunt, Molepske Jr., Toles, Parisi and Soletski; cosponsored by Senators Hansen, Coggs, Wirsch, Kreitlow, Taylor, Lehman, Holperin, Miller, Erpenbach, Carpenter and Vinehout.

April 21, 2010          Referred to Committee on Labor, Elections and Urban Affairs.

April 22, 2010          Failed to concur pursuant to Senate Joint Resolution 1.



---

Adam Plotkin  
Committee Clerk

**Vote Record**  
**Committee on Labor, Elections and Urban Affairs**

Date: Wed., March 10, 2010

Moved by: W. RCH Seconded by: LEHMAN

AB \_\_\_\_\_ SB 390 \_\_\_\_\_ Clearinghouse Rule \_\_\_\_\_  
AJR \_\_\_\_\_ SJR \_\_\_\_\_ Appointment \_\_\_\_\_  
AR \_\_\_\_\_ SR \_\_\_\_\_ Other \_\_\_\_\_

A/S Amdt \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Amdt \_\_\_\_\_

S Sub Amdt 1 \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Sub Amdt \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Amdt \_\_\_\_\_ to A/S Sub Amdt \_\_\_\_\_

Be recommended for:

☐ Passage      ☒ Adoption      ☐ Confirmation      ☐ Concurrence      ☐ Indefinite Postponement  
☐ Introduction      ☐ Rejection      ☐ Tabling      ☐ Nonconcurrence

Committee Member

**Senator Spencer Coggs, Chair**

**Senator Robert Wirch**

**Senator John Lehman**

**Senator Alan Lasee**

**Senator Glenn Grothman**

	<u>Aye</u>	<u>No</u>	<u>Absent</u>	<u>Not Voting</u>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Totals:	<u>5</u>	<u>0</u>	_____	_____

☒ Motion Carried

☐ Motion Failed

**Vote Record**  
**Committee on Labor, Elections and Urban Affairs**

Date: Wed., March 10, 2010

Moved by: WIRCH

Seconded by: LEHMAN

AB \_\_\_\_\_ SB 390 \_\_\_\_\_ Clearinghouse Rule \_\_\_\_\_  
AJR \_\_\_\_\_ SJR \_\_\_\_\_ Appointment \_\_\_\_\_  
AR \_\_\_\_\_ SR \_\_\_\_\_ Other \_\_\_\_\_

A/S Amdt \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Amdt \_\_\_\_\_

A/S Sub Amdt \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Sub Amdt \_\_\_\_\_

A/S Amdt \_\_\_\_\_ to A/S Amdt \_\_\_\_\_ to A/S Sub Amdt \_\_\_\_\_

Be recommended for:

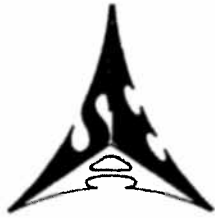
☒ Passage      ☐ Adoption      ☐ Confirmation      ☐ Concurrence      ☐ Indefinite Postponement  
☐ Introduction      ☐ Rejection      ☐ Tabling      ☐ Nonconcurrence

Committee Member

	<u>Aye</u>	<u>No</u>	<u>Absent</u>	<u>Not Voting</u>
<b>Senator Spencer Coggs, Chair</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Senator Robert Wirch</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Senator John Lehman</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Senator Alan Lasee</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Senator Glenn Grothman</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Totals:</b>	<u>3</u>	<u>2</u>	_____	_____

☒ Motion Carried

☐ Motion Failed



**State Engineering Association**  
4510 Regent Street  
Madison, WI 53705-4963

(608)233-4696  
(608)233-6766 FAX  
[www.wisea.org](http://www.wisea.org)

---

January 7, 2010

Senator Spencer Coggs  
Room 123 South  
State Capitol  
P.O. Box 7882  
Madison, WI 53707-7882

Subject: 2009 Senate Bill 390

Dear Senator Coggs:

The State Engineering Association (SEA) supports the resolution of the Employee Trust Funds (ETF) Board regarding the purpose of Senate Bill 390. The ETF Board stated that it opposes 2009 Senate Bill 390 as introduced, especially those portions of the bill that misappropriate to certain entities the names and addresses of retirees in order to send unsolicited communications to those retirees for purposes wholly unrelated to Chapter 40 benefit programs.

The State Engineering Association respectfully requests that the bill be redrafted or tabled indefinitely unless meaningful changes are made to the bill. We also request that the bill be further reviewed and sent to the Joint Survey Committee on Retirement Systems for its consideration.

There are several reasons for SEA's concern:

- The deduction of membership dues for a private organization, even an employee organization, has nothing to do with the mission of the Department of Employee Trust Funds. Furthermore, all retired employees would receive this notification since ETF has no record of what organization a former public employee was associated with.
- The requirements of the bill can be viewed as a diversion of ETF's already-thin resources from requirements to properly administer the retirement system and other benefit plans, to advise members, and to properly pay benefits. SEA is concerned that ETF will be further burdened with another unfunded mandate. With proposed furloughs, staff cuts and increasing service demands from annuitants, the implementation of such a rule would be especially unacceptable.

- There may be other ways to accomplish the same goal of contacting former employee organization members. Links to the appropriate organizations can be provided on the ETF web site or in the newsletter. If the bill should progress, the proposed program should be an opt-in type of process and not an opt-out procedure.
- Another concern is that the adopted provisions add an exception to ETF's long-standing confidentiality provisions, permitting lists of annuitant names to be distributed to outside organizations and affiliates. ETF's current privacy statute explicitly prohibits such distribution of lists of members.

Legislation creating this additional exception weakens confidentiality provisions by permitting yet another situation in which member information may be distributed. Members could easily jump to the conclusion that ETF is "selling" their information to outside parties. Once a change is made for one group, other groups would be in a strong position to force ETF to release information to them also, regardless of intended use, because of the need for uniformity in practice.

For everyone's sake it is best to leave the current practice in place and to maintain the privacy of the annuitants.

Respectfully Submitted,



Mark Klipstein  
President  
State Engineering Association

cc: Joint Survey Committee on Retirement Systems ☐  
David Stella, Secretary Employee Trust Funds  
Senate Committee on Labor, Elections and Urban Affairs







**Wisconsin Retired  
Educators' Association**

**Your voice. Your choice.**

**Legislative Memo—SB 390  
Deduction of Voluntary Payments from Retirement Annuities**

Date: February 4, 2010

To: **The Committee on Labor, Elections and Urban Affairs**  
Senator Spencer Coggs, Chair  
Senator Robert Wirsch  
Senator John Lehman  
Senator Alan Lasee  
Senator Glenn Grothman

From: **The Wisconsin Retired Educators' Association (WREA)**  
Jane Elmer, WREA Executive Director and Lobbyist  
Berland Meyer, WREA President  
Arnold Chandler, WREA Legislative Chair

Re: **SB 390**  
—Deduction of voluntary payments from retirement annuities  
—WREA's request to be included in the legislation

The attached letter to Senator Dave Hansen, author of SB 390, explains WREA's history and current position on the bill. As noted, previous versions of the legislation to allow voluntary dues deduction have included the Wisconsin Retired Educators' Association (WREA). However, SB 390 in its current form limits participation to retiree groups tied to employee organizations. That definition excludes WREA.

On behalf of the WREA Legislative Committee and Board of Directors, we respectfully request an amendment to include WREA in the legislation to allow WREA the same opportunity for voluntary dues deduction and mailings through the Department of Employee Trust Funds (ETF).



**Wisconsin Retired  
Educators' Association**

**Your voice. Your choice.**

**January 26, 2010**

**Senator Dave Hansen  
Room 18 South, State Capitol  
P.O. Box 7882  
Madison, WI 53707-7882**

**RE: SB 390; Request for an amendment to include WREA**

**Dear Senator Hansen:**

**The Wisconsin Retired Educators' Association (WREA) organized in 1951 to protect and promote the long term stability of the Wisconsin Retirement System (WRS). Almost 60 years later, we are the largest annuitant-based organization in Wisconsin, representing 13,600 members.**

**WREA has a long history of working on pension issues and representing retirees in Wisconsin. WREA (then WRTA) was the plaintiff in WRTA vs. Department of Employee Trust Funds (ETF) which was the litigation to restore the pension fund raid that occurred in the 1987 budget bill. After a 10-year court battle, the Wisconsin Supreme Court ruled that action unconstitutional and determined the pension fund needed to be restored.**

**WREA played a major role in that successful litigation.**

**The purpose of this letter is to bring to your attention that SB 390, legislation that would allow retiree groups to receive membership dues deducted from the trust fund, does not include WREA. Such legislation has been introduced in the past and included retiree organizations, charitable groups, etc. Past legislation has not been successful for a variety of reasons including costs to the system, privacy issues, etc.**

**The difference between past legislation and the current SB 390 is that WREA is not included in SB 390 in its current form. SB 390 limits the organizations to be considered for dues deduction to retiree groups affiliated with an employee group. WREA had its original roots in the Wisconsin Education Council (WEA)—now WEAC. However, in the early 1970s WREA became an independent, non-partisan organization and since then has no direct affiliation with an employee union.**

**WREA does not have a position on SB 390 at this time, however, we would like to be eligible for dues deduction if this legislation moves forward. We respectfully request that you consider an amendment to SB 390 to this effect.**

**Thank you for your consideration. We will look forward to hearing from you. Enclosed please find a copy of our Legislative Priorities Brochure, our most recent *WREA News* and our legislative position papers. You may also want to check us out on the web at [www.wrea.net](http://www.wrea.net).**

**Sincerely,**

**Jane Elmer, WREA Lobbyist**

**Berland Meyer, WREA President**

2564 Branch Street • Middleton, WI 53562 • phone: 608.831.5115 • fax: 608.831.1694

email: [wrea@wrea.net](mailto:wrea@wrea.net) • [www.wrea.net](http://www.wrea.net)





# SEN. SPENCER COGGS

6<sup>TH</sup> SENATE DISTRICT

State Capitol  
Room 123-South

Toll-free: 877-474-2000  
Madison: (608) 266-2500

Fri., February 26, 2010

News Release  
*For Immediate Release*

## **Sen. Coggs will Chair Labor Committee Hearing on AFSCME Lobby Day** *Senator shows solidarity with AFSCME members*

**MADISON** – Chairman Spencer Coggs' Senate Committee on Labor, Elections, and Urban Affairs will meet in a public hearing next Wednesday, March 3, on two important labor bills.

One of the legislative initiatives, Senate Bill (SB) 390 would allow retired state employees who are members of the American Federation of State, County, and Municipal Employees (AFSCME) to voluntarily have their dues continue to be deducted from their retirement checks. The hearing will take place the afternoon of the annual statewide AFSCME members' visit to the Capitol.

"SB 390 would make it easier for retirees to remain engaged members of their union without having to physically send in dues checks throughout the year. The bill provides for extensive privacy, and contains voluntary participation provisions to make it fair and equitable to all," said Sen. Coggs.

The other legislation, Senate Bill (SB) 523, authored by Senator Coggs, would prevent all state agencies, which includes the University of Wisconsin system, from using any money to create roadblocks to union organizing activities.

"SB 523 would seem to be an obvious proposal, but one that has not yet made it into law. If enacted, this bill would provide protections for taxpayers and preserve the fundamental right for state employees to participate in labor unions," said Sen. Coggs.

During the day next Wednesday, members of AFSCME will visit with their legislators throughout the capitol to highlight their legislative priorities for the remainder of this session.

"As a member, and former Chief Steward of AFSCME Local 1091, I know first hand the value that an organized union can offer in terms of negotiating terms of employment, fighting for worker safety, and creating a level playing field for all state and municipal employees," said Sen. Coggs.

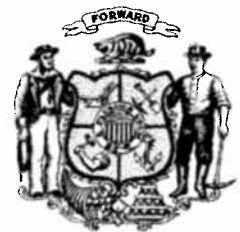


**Jerry LaPoint**  
*Chair, AFSCME Retiree Council*

2732 Fourth Street  
Eau Claire, Wisconsin 54703  
Home: (715) 834-1996



# WISCONSIN STATE LEGISLATURE





WISCONSIN STATE SENATOR

**DAVE HANSEN**

SENATOR – 30TH DISTRICT

ASSISTANT MAJORITY LEADER

Senate Bill 390 deduction of voluntary payments from retirement annuities under WRS

**Committee on Labor, Elections and Urban Affairs**

**Wednesday, March 3, 2010**

Thank you Mister Chairman and members of the committee. I am here today to testify in favor of Senate Bill 390, legislation to allow retirees that are receiving annuity payments under the Wisconsin Retirement System to have monthly dues payments to public sector retiree organizations and contributions to affiliated entities automatically deducted from their pension checks.

Under an automatic deduction system, retiree dues and other payments to a bonafide retiree organization or affiliated entity, on a totally voluntary basis, would be deducted from the retiree's pension check each month. The bill sets up the following parameters:

- 1) The retiree would sign a mutually agreed to membership application officially authorizing deductions from his or her retirement check;
- 2) Public sector employee organizations will have the ability to conduct blind mailings at their own expense to WRS recipients to recruit new memberships. The WRS list would remain confidential, with the Department of Employee Trust Funds maintaining control of all lists, and sending out materials through its own internal mailing process. Participant information would remain confidential; and
- 3) WRS would establish rules as it deems appropriate to operate the monthly deduction system in the most efficient manner.

This legislation passed the Joint Finance Committee last April but was not included as part of the final Budget package.

I am also introducing an amendment to the bill. Senate Amendment 1 addresses the concerns of the Wisconsin Retired Educators Association, WREA. Because WREA is not officially considered an "employee organization" the amendment would include them by adding a reference to included "a retiree organization that represents annuitants." Similar legislation has been introduced in the past that carried with it fiscal estimates ranging from \$56,000 to \$400,000. This current version minimizes the fiscal impact and creates a mechanism through which retiree organizations will pay for materials and mailings while preserving the privacy of WRS participants. In addition, ETF now has a new payment system which will facilitate deductions of this type.

Thank you again Mister Chairman and members of the committee. I'd be happy to answer any questions.

**Committees**

Joint Committee on Finance, Senate Vice Chair  
Education  
Transportation, Tourism, Forestry and Natural Resources  
Special Committee on State-Tribal Relations  
Senate Organization  
Joint Committee on Legislative Organization

**State Capitol**

P.O. Box 7882  
Madison, Wisconsin 53707-7882  
Phone: (608) 266-5670  
Toll-Free: 1-866-221-9395  
Fax: (608) 267-6791  
E-mail: sen.hansen@legis.wisconsin.gov





**Testimony of  
Steve Regenstreif  
Director,  
AFSCME Retirees**

**Before the Committee on Labor, Elections and Urban Affairs  
Of the  
Wisconsin State Senate**

**On**

**-SB 390  
Voluntary, Automatic Dues Deduction  
From Pension Checks and Authorization Permitting  
“Blind Mailings”**

**March 3, 2010**



Good Morning. My name is Steve Regenstreif and I'm the Director of the national Retiree Program of the American Federation of State, County and Municipal Employees. I want to thank you, Chairman Coggs, along with the other members of the committee, for giving me the opportunity to testify today on behalf of AFSCME's statewide Wisconsin Retiree Chapter 7.

The legislation I'm here to address, SB 390, would permit pensioners in the Wisconsin retirement system to sign voluntary dues deduction cards when joining a labor affiliated retiree organization. In the case of union members in the workforce, the system is commonly known as "dues checkoff." For many years now, it has been AFSCME's primary method of dues collection for our working members here in Wisconsin and around the nation. In fact, most unions use a dues checkoff system, in cooperation with their members' employers.

Checkoff has been so successful as an efficient dues collection mechanism that, in 1980, when the union started the AFSCME Retiree Program, we sought similar mechanisms in jurisdictions where we had organized retiree chapters. Often it was accomplished through the legislative process, as we are attempting here.

Over the years, over 40 major public retirement systems have instituted checkoff from pension checks and the list has grown by an average of two or three systems each year. They include many state funds, including Illinois, Ohio, Connecticut, Maine and Washington State.

Automatic dues deduction has been extremely helpful to our retiree chapters. Nationwide, AFSCME has over 235,000 dues-paying retiree-members and many of our chapters which are run by our retirees have hundreds and even thousands on their membership rolls. Hand collection of dues can be a time-consuming and expensive procedure, often taking months to complete each year. Dues checkoff is a much easier process.

We start by working with the retirement system on the appropriate language and format for a checkoff card. Together, we try to devise the simplest and least expensive process for the retirement system to institute dues deduction. Once this is accomplished, retirees can voluntarily sign a card and authorize the retirement system to deduct dues every month for membership in AFSCME. The retiree chapter submits newly signed cards to the retirement system on a monthly basis.

Let me emphasize that the decision to sign a checkoff card is completely voluntary on the part of the pensioner. If, at any time, a retiree wishes to cancel his checkoff card, all he has to do is drop a note to the retiree chapter. The retiree chapter immediately reports the cancellation to the retirement system and the member's dues deductions stop.

In most cases, however, automatic dues deduction is just as convenient for the retiree as it is for the union. Once a retiree signs up, he never has to write a check or remember to pay his dues. This is especially important for those members who take advantage of AFSCME's special membership benefits, such as our low-interest MasterCard or discount legal services plan. An inadvertent lapse in membership for these retirees means cancellation of these benefits.

Many retirees find it more affordable to deduct a small amount of money from their pension check each month rather than write a check for a larger amount each year. For most of our chapters, dues are \$15 per member per year or \$1.25 a month. Of that amount, the Chapter and its local subchapters keep .95 cents and send .30 cents to the International Union as a per capita tax.

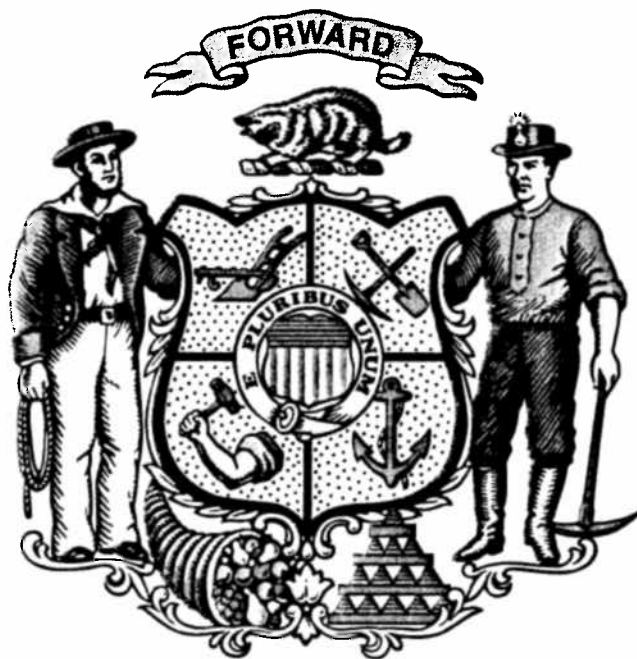
When dues are collected through checkoff rather than by individual hand collection and renewal procedures, AFSCME retiree chapters have a lot more time to devote to other social and educational activities.

Senate Bill 390 would also permit what is commonly referred to as a "blind mailing" for the purpose of membership recruitment. A "blind mailing" would alleviate the general concerns about maintaining the confidentiality of the list of pensioners and avoid any undue burden on the Wisconsin Retirement System. Under this proposal, the retirement system would furnish the names and addresses to either a mail house of their choice or to the mailing facilities of state government. AFSCME, in turn, would furnish sufficient quantity of printed materials to be sent to each retiree, along with payments for mailing services and postage. AFSCME would never see or be in possession of the list and confidentiality would be maintained. All costs for printing, postage and mail house charges would be borne by AFSCME.

Under the proposed bill, no vendor or commercial enterprise can obtain access to the list of pensioners. Only a bonafide public sector retire organization under the draft legislation would have access to a "blind mailing." The retirement system, at its own discretion, may review any proposed written material prior to a mailing.

We know that maintaining the confidentiality of the names and addresses of pensioners is a concern here in Wisconsin. It is also has been a concern in other states as well. That is why AFSCME came up with the idea of a "blind mailing" whereby we have a vehicle to communicate with retirees informing them about our organization, while at the same time maintaining confidentiality. Blind mailings are permitted in states such as Texas, Nevada, Illinois and Rhode Island.

AFSCME hopes you will agree with the purpose of this legislation and will look favorably on the institution of pension check-off and permit our Wisconsin retiree organization to do "blind mailings." Thank you again for your time and consideration.





**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
David A. Stella  
SECRETARY

801 W Badger Road  
PO Box 7931  
Madison WI 53707-7931  
1-877-533-5020 (toll free)  
Fax (608) 267-4549  
<http://etf.wi.gov>

**CORRESPONDENCE MEMORANDUM**

**DATE:** March 3, 2010  
**TO:** Senate Committee on Labor, Elections and Urban Affairs  
**FROM:** Matt Stohr, Director of Legislation and Communications  
**SUBJECT:** 2009 Senate Bill 390, Regarding Voluntary Payments from Wisconsin Retirement System (WRS) Annuities

The Department of Employee Trust Funds (ETF) and the Employee Trust Funds Board (Board) oppose 2009 Senate Bill (SB) 390. SB 390 does two primary things: 1) it requires ETF to deduct voluntary payments from the monthly pension checks of retirees and remit the payments to an employee organization, a retiree organization, or any other entity affiliated with either an employee or retiree organization; and 2) it requires ETF, at the request of an organization or affiliated entity, to mail to retirees any printed information and membership materials for the organization or affiliated entity.

Proponents of SB 390 will note the importance of strong retiree organizations. We recognize the importance of those organizations to retirees and the WRS. Such organizations serve as valuable resources for retired public employees to share common experiences and stay active in community activities. They also help ETF by serving as sounding boards for examining ways to improve our customer service. In addition, we work with these organizations on a regular basis to disseminate information about our programs, benefits and services. While the intention of SB 390 -- to support strong retiree organizations -- is laudable, we believe it comes at too high of a price.

We have 3 primary objections to SB 390:

- **Expectation of privacy.** Current law places a high value on the privacy of Wisconsin Retirement System (WRS) member data. The Bill's mailing requirement is a significant departure from current law, which exempts ETF's membership lists from public access and prohibits ETF from providing lists of retirees to any organization except as required for the proper administration of ETF's programs. Senate Bill 390 appears to place these privacy concerns behind the interests of employee, retiree and affiliated organizations. We also believe it sets a precedent for future inappropriate commercial or political use of ETF's lists.

- **Unwanted solicitations.** SB 390 would effectively require ETF to mail solicitation material to all 150,000 retirees, regardless of whether those retirees are actually members of an employee organization, retiree organization, or an affiliated entity. ETF has no way to track which private organizations WRS retirees belong to. Depending on the number of organizations interested in using this service, all WRS retirees could receive multiple mailings each year. We believe many retirees will not want to receive these bulk-mailed solicitations; ETF's mailing lists should not be used to distribute them among our retirees.
- **Use of Trust Assets.** ETF was established solely to administer public employee fringe benefit programs. ETF's operating budget is derived from a small portion of the investment income of the Public Employee Trust Funds. SB 390 requires these resources to be used for services unrelated to the benefit programs ETF administers. Although SB 390 directs the Secretary of ETF to charge a fee for the **mailing** component, it does not contain an appropriation to allow ETF to actually use the fee for **operational purposes**. In addition, ETF is not able to charge the organizations for the collection of the voluntary payments. Thus, general Trust Fund operating resources will be required to set up and administer this service. We believe that it is fair and appropriate to require employee organizations, retiree organizations and affiliated entities to pay for the services they receive to prevent the Trust Fund from subsidizing their operations and for those fees to be used to directly offset ETF's costs.

As referenced above, the Board, at its quarterly meeting in December, adopted a motion opposing SB 390 as introduced, especially the mailing component of the Bill. The Board was concerned with the use of ETF's mailing lists for purposes wholly unrelated to the administration of ETF's benefit programs and the precedential nature of that use.

We respectfully ask that you take no action on the Bill until the above concerns have been addressed.

I am happy to answer any questions you may have.

Thank you for considering our comments.



**Plotkin, Adam**

---

**From:** Doug Burnett [DBurnett@afscme.org]  
**Sent:** Tuesday, March 09, 2010 4:23 PM  
**To:** Sen.Coggs; Sen.Wirch; Sen.Lehman; Sen.Lasee; Sen.Grothman  
**Cc:** Whitesel, Russ; Sen.Hansen; Wagnitz, John; Plotkin, Adam; Browne, Michael; McGuire, Paula  
**Subject:** AFSCME Support for LRBs0325 to SB 390--Exec Session 10 a.m. Wednesday 3-9-10  
**Attachments:** AFSCME on Sub to SB 390 LRBs0325.pdf

Attached is a memo in support of a substitute amendment that may be offered tomorrow during the executive session on SB 390 in the Senate Committee on Labor, Elections, and Urban Affairs. We would appreciate your support of the amendment, as we believe it deals with many of the concerns of the Department of Employee Trust Funds.

Doug Burnett

Wisconsin Political and Legislative Director

AFSCME International

8033 Excelsior Drive, #A

Madison, WI 53717

Office: 608-836-6666

Fax: 608-836-3333

Cell: 608-332-3684

Email: [dburnett@afscme.org](mailto:dburnett@afscme.org)

Web: [www.wiafscme.org](http://www.wiafscme.org)



To: Members  
Senate Committee on Labor, Elections, and Urban Affairs

From: Doug Burnett, Wisconsin Political and Legislative Director  
AFSCME International

Re: Substitute Amendment to SB 390 (LRBs0325/1)

Date: March 10, 2010

---

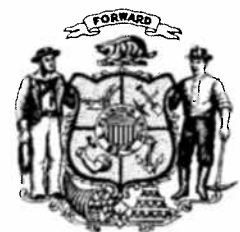
AFSCME supports the proposed substitute amendment (LRBs0325/1) to SB 390. We believe that this amendment addresses all cost-related concerns raised by the Department of Employee Trust Funds (DETF). The amendment does the following:

- Delays the effective date for the deduction system to July 1, 2011. The delay is intended to allow the department to do the computer programming related to implementation of the system in-house, and should eliminate the potential \$350,000-\$400,000 cost the department estimated for outsourced IT work. The DETF Fiscal Estimate notes the following on this issue:
  - "The provisions of this bill require various information technology (IT) and process modifications. Depending on the target implementation date, the Department could utilize external IT resources for the required information technology changes or internal Department staff. Using internal Department staff for the implementation tasks would not require significant additional resources but would take much longer to implement due to current projects, staffing, and technical constraints. As such, this estimate assumes the utilization of external IT resources to implement the IT system modifications required by this bill."
- Requires the department to "charge organizations and affiliated entities that wish to receive monthly voluntary payments a fee to cover all costs incurred by the department in deducting and remitting voluntary payments and in mailing the printed information and membership materials," and creates a program revenue appropriation to receive the fees. Again, this addresses a cost issue raised by the department, and also creates a necessary appropriation line.
- Includes an indemnification provision, as requested by the department, to insure that no liability will be incurred by the department because of the system.
- Incorporates SA 1 to SB 390, which makes a technical modification to permit the Wisconsin Retired Educators Association to participate in the system.





# WISCONSIN STATE LEGISLATURE





Date?

**Testimony of Jerry LaPoint, President  
Wisconsin/AFSCME Retiree Chapter 7  
Senate Bill 390**

Good Afternoon. My name is Jerry LaPoint and I serve as the President of Wisconsin Retirees Chapter 7, an affiliate of the American Federation of State, County and Municipal Employees. I want to thank you, Chairman Coggs along and the other Members of this Committee, for giving me the opportunity to testify today on behalf of our retiree organization. I would also note that the national director of AFSCME's program, Steve Regenstreif, is also here, and will testify later, and address any technical questions you may have on this legislation.

The legislation I'm here to address, Senate Bill 390, would permit pensioners in the Wisconsin retirement system to sign voluntary dues deduction cards to maintain their affiliation with their union as retirees. For many years now AFSCME's primary method of dues collection for our working members -- here in Wisconsin and around the nation, has been through an automatic deduction on their paycheck. This bill simply allows retirees to continue to have their dues automatically deducted in retirement. For most of our chapters, dues are \$15.00 per member per year or \$1.25 a month.

Since the AFSCME retirees program was started in 1980, over 40 major public retirement systems have instituted automatic deduction and the list has grown by an average of two or three systems each year. They include many state funds, including Illinois, New York, Connecticut, Arizona, Washington, and most recently Minnesota. Computer technology has made it much easier to accomplish this administratively.

Let me emphasize that the decision to sign a deduction card is completely voluntary on the part of the retiree. If, at any time, a retiree wishes to cancel his deduction, all he or she has to do is drop a note to the retiree chapter. The retiree chapter immediately reports the cancellation to the retirement system and the member's deductions stop.

Most of our state chapters have subchapters that meet regularly on the local level. In Wisconsin, we have several subchapters around the state. When they meet, they like to socialize with friends from working days. They plan excursions, luncheons and community service projects, and invite guest speakers to their meetings. Speakers cover a variety of topics, providing information on pensions, Social Security and Medicare, wills and other legal matters, community resources, and health care. Our chapters also follow developments in their pension plans and other retirement benefits. On the Federal level, they monitor Social Security and other senior citizen issues in much the same way.

AFSCME hopes you will agree and will look favorably on SB 390. Thank you again for your time and consideration.



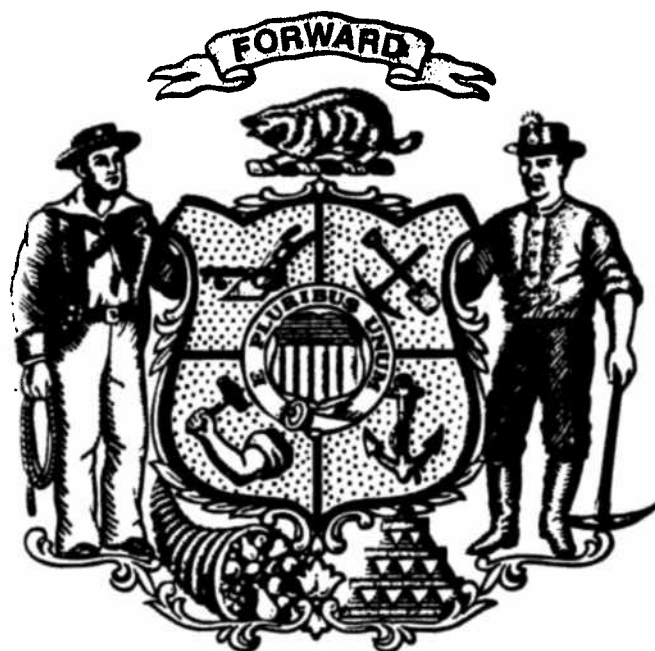
AFSCME - SB 390

Thurs. Jan. 14 @ 1:30pm

Steve, Jerry, Doug, SC  
↳ Eas Claire

mts. w/ Mary Hubler  
next Wed. @ 9a  
coming by  
@kernwards

- Mary Hubler problem in budget
- SB 390 is same language as budget, but they had some compromise language in budget
- Decker may be chilly
- 1.4m working members, 235k retirees in AFSCME
- 2 issues in bill
  - ① - voluntary opt-in for dues deduction
    - 43 pension systems participate
    - MN just passed it
    - ETF OK w/ dues deduction
  - ② - limited to only retirees who are part of organization or its retiree group
    - also offered / req'd to help ETF
- need access to list to communicate w/ retiree (ISDK)
  - suggested "blind mailing"
    - they draft, ETF reviews, they print & send (via ETF approved mailhouse)
    - They never actually see list
    - hold harmless ETF for damages
- ETF problem is on mailing piece
  - "outside the scope of what ETF should do"
  - "concerns on confidentiality for retirees"
- schedule sooner rather than later
  - will need to amend bill



- ▶ Home
- ▶ Lobbying in Wisconsin
- ▶ Organizations employing lobbyists
- ▶ Lobbyists

Presented by the Wisconsin  
Government Accountability Board

as of Monday, March 01, 2010

### 2009-2010 legislative session

## Legislative bills and resolutions

(search for another legislative bill or resolution at the bottom of this page)

### Senate Bill 390

deduction of voluntary payments from retirement annuities under the Wisconsin Retirement System. (FE)

**TEXT**  
sponsors  
LRB analysis

**STATUS**  
committee actions and  
votes  
text of amendments

**COST & HOURS**  
of lobbying efforts  
directed at this  
proposal

Organization		These organizations have reported lobbying on this proposal:	Place pointer on icon to display comments, click icon to display prior comments		
Profile	Interests		Date Notified	Position	Comments
•	•	AFSCME Council 11	11/29/2009	↑	
•	•	AFSCME International	12/5/2009	↑	
•	•	AFT - Wisconsin	12/15/2009	↑	
•	•	Brotherhood of Maintenance of Way Employees Division, IBT	2/22/2010	↑	
•	•	Professional Fire Fighters of Wisconsin Inc	2/1/2010	↑	
•	•	Wisconsin Professional Police Association	11/10/2009	↑	
•	•	Wisconsin Retired Educators Association	1/27/2010	↔	💬
•	•	Wisconsin State Employees Union	2/18/2010	↑	
•	•	Wisconsin Teamsters Joint Council 39	12/16/2009	↑	

Select a legislative proposal and click "go"

House

Assembly  
Senate

Proposal Type

Bill  
Joint Resolution  
Resolution

Proposal Number

390 (enter  
proposal number)

Legislative Session

2009 Regular Session ▼

Go



# **Recommendation to Wisconsin Retirement System for "Blind Mailings"**

American Federation of State, County and Municipal Employees  
January, 2010

## **Definition of a "Blind Mailing"**

To alleviate the general concerns about maintaining the confidentiality of the list of pensioners, and to avoid any undue burden on the Wisconsin Retirement System, AFSCME is proposing what is commonly referred to as a "blind mailing" for the purpose of membership recruitment. Under this proposal, the retirement system would furnish a disk or set of address labels in zip code order to either a mail-house of your choice, or by using the mailing facilities of the state government. AFSCME, in turn, would furnish a sufficient quantity of printed materials to be sent to each retiree, along with payments for mailing service and postage. AFSCME would never see or be in possession of the list and confidentiality would be maintained.


## **Specific Recommendations**

- Only a bonafide public sector retiree organization can have access to a blind mailing.
- A bonafide public sector retiree organization is defined as the retiree group officially affiliated with an employee organization that represents current public sector employees of Wisconsin state or local government.
- No vendor or commercial enterprise can obtain access to the list of pensioners.
- The retirement system, at its own discretion, may review any proposed written material prior to a mailing.
- Printed material in the mailing must make no expressed or implied endorsement of the sponsoring retiree organization by either the State of Wisconsin or the Wisconsin Retirement System.
- All costs for printing, postage and mail-house charges shall be borne by the organization requesting the mailing.
- Any retiree who has informed the retirement system in writing that they do not wish to receive mailings of this nature shall be removed from the list.
- In order to avoid any administrative burden on the retirement system, retirees will deal with the union or retiree association regarding all aspects of the membership solicitation. If the retiree should contact the retirement system at any time regarding the membership solicitation, the retirement system will refer the retiree to the designated union or association contact.
- Even though there has never been a problem anywhere in the nation regarding this kind of project, as a precaution and to show our goodwill, AFSCME will indemnify and hold harmless the retirement system against any and all claims or actions which may arise out of the mailing.



## **A SAMPLE OF PUBLIC RETIREMENT SYSTEMS THAT PERMIT “BLIND MAILINGS”**

- City of Baltimore Retirement System
- Illinois State Employees Retirement System
- Nebraska State Employees Retirement System
- City of Los Angeles Retirement System
- Montana Public Employees’ Retirement System
- Minnesota Public Employees Retirement Fund
- Employees Retirement System of Rhode Island
- Nevada Public Employees Retirement System
- Texas Employees’ Retirement System
- Wash. State Public Employee Retirement System



## **A SAMPLE OF PUBLIC RETIREMENT SYSTEMS THAT RELEASE THEIR LIST OF PENSIONERS TO THE AFSCME RETIREE PROGRAM**

- Alaska State Retirement System
- Maine State Retirement System
- Maryland Employees Retirement System
- Ohio Public Employees Retirement System
- City of Philadelphia Retirement System
- Connecticut State Employees Retirement System
- New York State Employees Retirement System
- City of Detroit Retirement System
- Minnesota State Employees Retirement System
- State of Florida

## **Recommendations for a Dues Deduction System for the Wisconsin Retirement System**

**American Federation of State, County and Municipal Employees  
January, 2010**

Under an automatic dues deduction system, retiree dues to a bonafide retiree organization, on a totally voluntary basis, would be deducted from the retiree's pension check each month. The details:

- The retiree would sign a mutually agreed to membership application officially authorizing this deduction from their retirement allowance.
- Only a bonafide public sector retiree organization can have access to the retiree dues deduction system.
- A bonafide public sector retiree organization is defined as the retiree group officially affiliated with an employee organization that represents current public sector employees of Wisconsin state or local government.
- No vendor or commercial enterprise can obtain access to the dues deduction system.
- AFSCME would be willing to work with the Retirement System on a dues deduction mechanism that would impose no undue administrative burden on any of the parties.
- The Retirement System can establish such rules as it deems appropriate to operate a retiree dues deduction system in the most efficient manner.
- The retiree organization shall submit all additions and deletions for the dues deduction system once a month by a date determined by the retirement system.
- If membership information is submitted on or before that date, the Retirement System will make every effort to have the deduction begin with the next pension check.
- To enhance administrative efficiency, the retirement system can establish a minimum number of retirees per organization to qualify for dues deduction.
- If retirees wish to cease this deduction, the retiree shall inform, in writing, their retiree organization. The retiree organization shall then be responsible for informing the retirement system about the change.
- Even though there has never been a problem anywhere in the nation regarding the operation of a retiree dues deduction system, as a precaution and to show our goodwill, AFSCME will indemnify and hold harmless the Wisconsin Retirement Systems against any and all claims or actions which may arise out of the operation.

January, 2009

**RETIREMENT SYSTEMS**  
**PERMITTING**  
**PENSION DUES DEDUCTION**

<b><i>SYSTEM</i></b>	<b><i>TYPE OF BENEFICIARIES</i></b>
Arizona State Retirement System	All state and most local government retirees.
Baltimore Retirement System	Retirees of the City of Baltimore, Maryland.
California Public Employees' Retirement System	All state government retirees, as well as a number of the local government retirees.
Chicago Retirement System	Retirees of the City of Chicago, Illinois.
Cincinnati Retirement System	Retirees of the City of Cincinnati, Ohio.
Colorado Public Employee Retirement Association	All Colorado state government retirees, as well as most retirees of local governments.
Connecticut Municipal Employees Retirement System	Various municipal retirees across the state.
Connecticut State Employees' Retirement System	All state government retirees.
Contra Costa County, California Retirement System	All retirees of Contra Costa County, California.
Cook County, Illinois Retirement System	All retirees of Cook County, Illinois.
Delaware State Retirement System	All state government retirees, as well as a number of local governments.
Detroit Retirement System	Retirees of the City of Detroit, Michigan.
Employees Retirement System of Rhode Island	All state government retirees of Rhode Island.
Employees Retirement System of Texas	All Texas state government retirees.
Hawaii Employees' Retirement System	All state and local government retirees.

<b>SYSTEM</b>	<b>TYPE OF BENEFICIARIES</b>
Houston Municipal Employees Retirement System	All City of Houston, Texas retirees.
Illinois Municipal Retirement Fund	All local government retirees with the exception of Chicago and Cook County.
Illinois State Employees' Retirement System	All state government retirees.
Illinois State University Retirement System	All retirees of the various public universities in the state.
Los Angeles County Employees' Retirement System	All retirees of Los Angeles County, California.
Los Angeles City Employees Retirement System	Retirees of the City of Los Angeles, California.
Maine State Retirement System	All state and local government retirees.
Maryland Employees' Pension System	All retirees of the State of Maryland, as well as retirees of most local governments in the state.
Minneapolis Employees Retirement Fund	All retirees of Minneapolis, Minnesota.
Minnesota Public Employees Retirement Fund	All Minnesota local government retirees.
Minnesota State Employees Retirement System	All Minnesota state government retirees.
Nevada Public Employees' Retirement System	All state and local government retirees.
New Haven Police Retirement System	Retired Police Officers of New Haven, Connecticut.
New Mexico Public Employees' Retirement System	All state and local government retirees.
New York City Cultural Institutions Retirement System	Retirees from museums, zoos, and other city cultural institutions.
New York City Employees Retirement System	All retirees of the City of New York.
New York State Police and Fire Retirement System	Retired New York police and firefighters.

<i><b>SYSTEM</b></i>	<i><b>TYPE OF BENEFICIARIES</b></i>
New York Employees' Retirement System	All retirees of the state of New York and all local government retirees with the exception of New York City.
Ohio Public Employee Retirement System	All Ohio state, local and university retirees.
Ohio School Employees Retirement System	All Ohio non-teaching school employees.
Oregon Public Employees Retirement System	All Oregon state and local government retirees.
Philadelphia Retirement System	Retirees of the City of Philadelphia, Pennsylvania.
Pontiac, Michigan General City Retirement System	All retirees of the City of Pontiac, Michigan.
San Mateo County, California Retirement System	All retirees of San Mateo County, California.
Washington Public Employees' Retirement System	All retirees of the state of Washington, including most local government retirees.
Waterbury Police Retirement System	Retired Police Officers of Waterbury, Connecticut.
Wayne County, Michigan Retirement System	All retirees of Wayne County, Michigan
West Virginia Public Employees' Retirement System	All state and local government retirees.
Wilmington Retirement System	Retirees of the City of Wilmington, Delaware.



# LEVA Exec & Hearing - Mar. 3, 2010

## EXEC

Robert Glasser > nothing  
SB 423

SB 390

## HEARING

SB 390

### Hansen & Jerry LaPoint

- both have written testimony
- SC? - allows retirees able to stay in touch
  - strictly voluntary? - yes
- SL? - not really a question
- GG? - on costs at ETF

### Matt Stohr, ETF

- has written testimony
- LC? - what is the need for program revenue
- Wirth? - on privacy, Lehman? - on unwanted solicitations
  - ↳ blind mailing list
- GG? - asks for operational cost estimate
- <sup>got</sup> asks for bill to retiree payments assessment
- ~~denied~~ 13.10 request last December
- SL? - what's need for one time imple

## Steve Regester

- has written testimony
- Wirth? on precedence in other states
- Lehman? on actual costs
  - shocked at estimate by ETP
- get other state costs to Hansen
- do shotgun mailings in every state?
  - not too unusual
- SC? - any accusations of impropriety in other states?
  - no safeguards in place

## Robert Schaefer - State

---

## SB523

### SC

- written testimony

### Bryan K

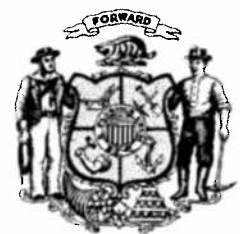
## Peter Rickman - TAA

- has written testimony
  - have been no examples of this happening prior to VW example
-





# WISCONSIN STATE LEGISLATURE



# LEVA Exec & Hearing - 3/10/10

EXEC

SB 390

Russ explains sub

SB 390

broadcast  
on WT Eye

no one says nothing or nothing



HEARING

AB 560

Kurt Stegge - brief remarks

AB 567

no testimony - Russ describes briefly

SB 522

Ron Kent, James Buchen, John Conway

- AFL + WMC have written testimony
- Conway brief remarks, overview of Walker's Camp + process
- Buchen goes off script, mostly about process
- Ron Kent, opening off script remarks then reads testimony
- SC asks them to comment on efforts to reach consensus
- Buchen talks about how they work together
- Kent talks about how they work together + move on process
- Grothman ?'s on increased PPD + PTD rates
- try to explain how it works

①